

Creating Annual Appraisals

From the Rater's Home Page in PERforM, he or she will click the Create New Appraisal link.

The Missouri State Employee Online Performance Appraisal System

PERforM
Productivity, Excellence and Results for Missouri

Monday, April 23, 2007 2:25:20 PM Welcome - ALLAN FORBIS (BDS\Perform_BDS) your role(s): Admin Reviewer Rater

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This will take the Rater to a screen listing the employees he or she supervises. The Rater will select the employee for whom an appraisal is to be created by clicking on the employee's name.

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Wednesday, April 25, 2007 12:05:15 PM Welcome - ALLAN FORBIS (BDS\Perform_BDS) your role(s): Admin Reviewer Rater

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[Home Page](#) > Select Employee - Performance Appraisals

Employee List - Performance Appraisals [Who is required to have an annual appraisal?](#)

You are responsible for supervising and appraising the following employees. (Click on any column heading to sort data by that column in ascending order.) Click on an employee's name to create a new performance appraisal.
(2) total employees

| Employee Name | Title Code | Job Title | Organization Name | Supervisor | Annual Required |
|------------------------------------|------------|-------------------|-------------------|------------|-----------------|
| LEVY, KELLY ANN | 000493 | TRAINING TECH III | PERS-STAFF | Yes | Yes |
| SCROGGINS, CYNTHIA | 000493 | TRAINING TECH III | PERS-STAFF | Yes | Yes |

The Rater will be taken to the Select Appraisal Type screen to select the type of appraisal they want to create for the employee. The Rater will select the desired type from the drop down box and click "OK."

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Wednesday, April 25, 2007 12:05:43 PM Welcome - ALLAN FORBIS (BDS\Perform_BDS) your role(s): Admin Reviewer Rater

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[Home Page](#) > [Select Employee - Performance Appraisals](#) > Select Appraisal Type

Select New Appraisal Type [How to Evaluate and Rate Employee Performance Objectives](#)

| | | | |
|---------------|-------------------|--------------|------------|
| Employee Name | LEVY, KELLY ANN | Organization | PERS-STAFF |
| Job Title | TRAINING TECH III | Supervisor | Yes |

Select New Appraisal Type: Annual

☐ Enable Quick Scoring

This action will take the Rater to the Create Performance Appraisal screen.

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Thursday, May 24, 2007 11:43:53 AM Welcome - ALLAN FORBIS (BDS\Perform_BDS) your role(s): [Admin](#) [Reviewer](#) [Rater](#)

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Create New Appraisal [How to Evaluate and Rate Employee Performance Objectives](#)

| Employee Details | | Performance Objectives | |
|------------------|----------------------------|------------------------|-----------------------------|
| Employee Name | SCROGGINS, CYNTHIA | Job Title | TRAINING TECH III |
| Supervisor Name | FORBIS, ALLAN J. | CIVS Description | UCP MERIT SYSTEM CLASSIFIED |
| Agency | OFFICE ADMINISTRATION-OPER | Percentage Fulltime | 1.0 |
| Organization | PERS-STAFF | Months of Service | 29.0 months |

| Performance Appraisal Details | | | |
|-------------------------------|--------|----------------|----------------------|
| Appraisal Type | Annual | Rating Period | 1/1/2007 - 4/30/2007 |
| Appraisal Status | New | Appraisal Date | 4/23/2007 2:22:36 PM |
| | | Overall Score | - |
| | | Overall Rating | - |

1. Knowledge of Work Rating: ● 1 ● 2 ● 3 ● 4 ● 5 ● 6 ● 7 ● 8 ● 9 ● 10

Performance Objectives:

1. Seek and obtain necessary education to meet performance requirements.

Comments:

2 CONDENSED SCREEN PRINT
(Not all Performance Components are shown)

5. Dependability Rating: ● 1 ● 2 ● 3 ● 4 ● 5 ● 6 ● 7 ● 8 ● 9 ● 10

Performance Objectives:

1. Adhere to the agreed upon work schedule as part of the DIS Work Hours Policy.
2. Obtain prior approval for all annual leave.

Comments:

Overall Comments:

3

Appraisal Status: [In Progress](#) Overall Score: Overall Rating:

4 5 6 7 8

[Calculate Only](#) [Save](#) [Submit](#) [Exempt & Submit](#) [Attachments](#) [Print Preview](#)

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Using the Create Performance Appraisal screen, the Rater can:

- 1 Rate each performance component
- 2 Enter comments about the employee's performance for each performance component
- 3 Enter overall comments about the employee's performance during the appraisal period
- 4 Calculate the employee's overall score and performance rating
- 5 Send the completed Appraisal to the Reviewer for approval
- 6 Exempt the employee from the Annual Appraisal (in accordance with agency policy)
- 7 Attach a document to the Appraisal
- 8 Print the Appraisal

Entering Written Comments on the Employee's Appraisal

Written comments regarding the employee's performance during the appraisal period may be entered on the Create Performance Appraisal screen (or the Edit/Update Performance Appraisal screen if the appraisal has already been created and saved), in the comment field for each performance component and the overall comment field near the bottom of the screen. To include comments, the Rater places his or her cursor in the appropriate field and types their comments. The text is saved in PERforM each time the Rater saves the appraisal. The Rater can change the text in the fields as many times as desired. The amount of characters (letters and spaces combined) permitted in each field is listed below:

Comments for Components – 500 Characters

Overall Comments – 1000 Characters

Note: Written comments can be added, modified and deleted until the time the appraisal has been approved by the Reviewer.

Scoring (Rating) Performance Components

On the Create Performance Appraisal screen (or the Edit/Update Performance Appraisal screen if the appraisal has already been created and saved), the Rater can indicate a score for each component by clicking next to the score they desire.



To review guidelines about scoring Performance Components, Raters can click the "How to Evaluate and Rate Employee Performance Components" link near the top of the screen.

Evaluating and Rating Employee Performance Components

At the conclusion of the defined appraisal period, the supervisor (rater) will use the PERforM System to rate the employee's performance in each job component on a scale of 1 – 10. The score will reflect how well the employee performed with respect to all of the objectives listed for each component.

The following information is presented as a "guideline" to assist each rater in determining the appropriate rating to select for each applicable component.

| Rating | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
|--|---|---|--|--|--|---|---|---|---|----|
| Using observation, documentation and feedback relevant to the employee's performance during the appraisal period, determine which of the following ratings is appropriate for each job component? | Needs Immediate Improvement The employee consistently failed to meet few – if any objectives for the job component. | Development Area The employee met some of the stated objectives for the job component – but sometimes fell short of others. | Shows Appropriate Ability The employee met most if not all of the stated objectives for the job component. | Shows Strength The employee met most and exceeded many of the established objectives for this job component. | Shows Exceptional Skill The employee consistently exceeded all stated objectives for this job component. | | | | | |

Calculating the Results of Performance Component Scores

At the bottom of the Create Performance Appraisal screen, there is a “Calculate” button to calculate the employee’s overall score and populate the overall rating field. The score and overall rating is displayed at the bottom of the appraisal. “Attachments” and “Print Preview” buttons are grayed out until the appraisal is saved for the first time.

| | | | | | |
|------------------|-----|---------------|-------|----------------|-------------------|
| Appraisal Status | New | Overall Score | 5.625 | Overall Rating | Meets Expectation |
|------------------|-----|---------------|-------|----------------|-------------------|

[Calculate Only](#)
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To save the score, the Rater must click the “Save” button.



This action does not submit (send) the appraisal to the Reviewer. It merely allows the Rater to save his or her work. Similarly, saving the score does not prevent The Rater from changing the score for any performance component if he or she elects to do so.

Enabling “Quick Scoring”

If the Rater elects to do so, he or she can enable Quick Scoring of the appraisal by clicking the “Enable Quick Scoring” box and the “OK” button on the Select Appraisal Type screen.

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Thursday, May 24, 2007 11:52:38 AM

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Select New Appraisal Type [How to Evaluate and Rate Employee Performance Objectives](#)

| | | | |
|---------------|--------------------|--------------|------------|
| Employee Name | SCROGGINS, CYNTHIA | Organization | PERS-STAFF |
| Job Title | TRAINING TECH III | Supervisor | Yes |



Select New Appraisal Type:

☒ Enable Quick Scoring

This action will condense the appraisal so that only the rating or scoring feature of each Performance Component is displayed. The performance objectives and comments field for each component will not be visible.

The following screen print shows what the open appraisal will look like with Quick Scoring on:

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Create New Appraisal

[How to Evaluate and Rate Employee Performance Objectives](#)

Employee Details

Performance Objectives

| | | | |
|-----------------|----------------------------|---------------------|-----------------------------|
| Employee Name | SCROGGINS, CYNTHIA | Job Title | TRAINING TECH III |
| Supervisor Name | FORBIS, ALLAN J. | CIVS Description | UCP MERIT SYSTEM CLASSIFIED |
| Agency | OFFICE ADMINISTRATION-OPER | Percentage Fulltime | 1.0 |
| Organization | PERS-STAFF | Months of Service | 29.0 months |

Performance Appraisal Details

| | | | | | |
|------------------|---------------------|----------------|-----------------------|----------------|---|
| Appraisal Type | Annual | Rating Period | 1/1/2007 - 6/30/2007 | Overall Score | - |
| Appraisal Status | New | Appraisal Date | 5/24/2007 11:53:42 AM | Overall Rating | - |

| | | | |
|------------------------|------------|----------------------|------------|
| Appraisal Start Period | 01/01/2006 | Appraisal End Period | 12/31/2006 |
|------------------------|------------|----------------------|------------|

| | | |
|---|--------|--|
| 1. Knowledge of Work | Rating | <input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5 <input type="radio"/> 6 <input type="radio"/> 7 <input type="radio"/> 8 <input type="radio"/> 9 <input type="radio"/> 10 |
| 2. Quality of Work | Rating | <input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5 <input type="radio"/> 6 <input type="radio"/> 7 <input type="radio"/> 8 <input type="radio"/> 9 <input type="radio"/> 10 |
| 3. Situational Responsiveness | Rating | <input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5 <input type="radio"/> 6 <input type="radio"/> 7 <input type="radio"/> 8 <input type="radio"/> 9 <input type="radio"/> 10 |
| 4. Initiative | Rating | <input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5 <input type="radio"/> 6 <input type="radio"/> 7 <input type="radio"/> 8 <input type="radio"/> 9 <input type="radio"/> 10 |
| 5. Dependability | Rating | <input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5 <input type="radio"/> 6 <input type="radio"/> 7 <input type="radio"/> 8 <input type="radio"/> 9 <input type="radio"/> 10 |
| 6. Performance Planning and Documentation | Rating | <input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5 <input type="radio"/> 6 <input type="radio"/> 7 <input type="radio"/> 8 <input type="radio"/> 9 <input type="radio"/> 10 |
| 7. Leadership Skills | Rating | <input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5 <input type="radio"/> 6 <input type="radio"/> 7 <input type="radio"/> 8 <input type="radio"/> 9 <input type="radio"/> 10 |
| 8. Management Skills | Rating | <input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5 <input type="radio"/> 6 <input type="radio"/> 7 <input type="radio"/> 8 <input type="radio"/> 9 <input type="radio"/> 10 |

Overall Comments:

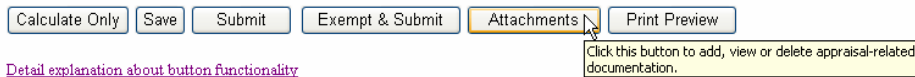
Appraisal has been saved but has not been submitted to the Reviewer.

[Detail explanation about](#) [Click this button to retain the latest changes.](#)

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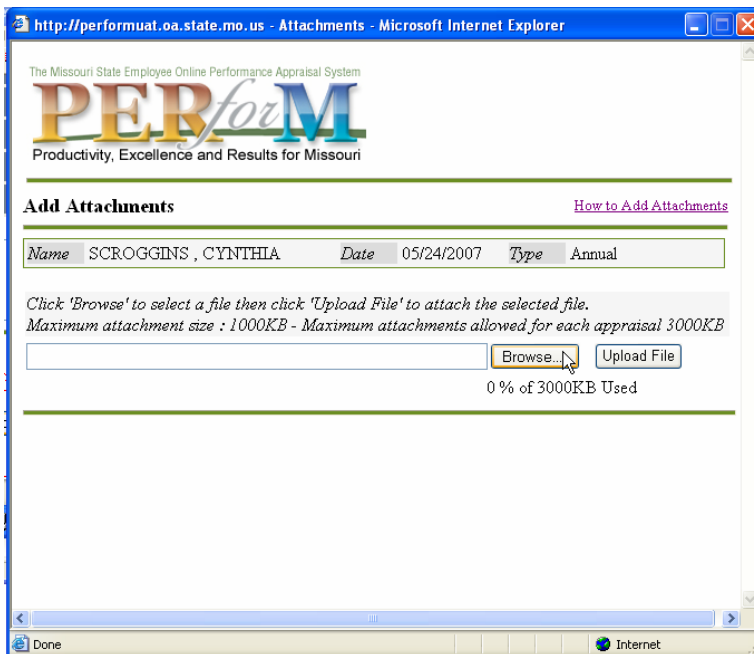
Using PERforM's Attachment Feature

The Rater can attach a document to the appraisal in PERforM once the appraisal has been saved for the first time. To include an attachment, the rater clicks the "Attachment" button on the bottom of the Create Performance Appraisal screen.

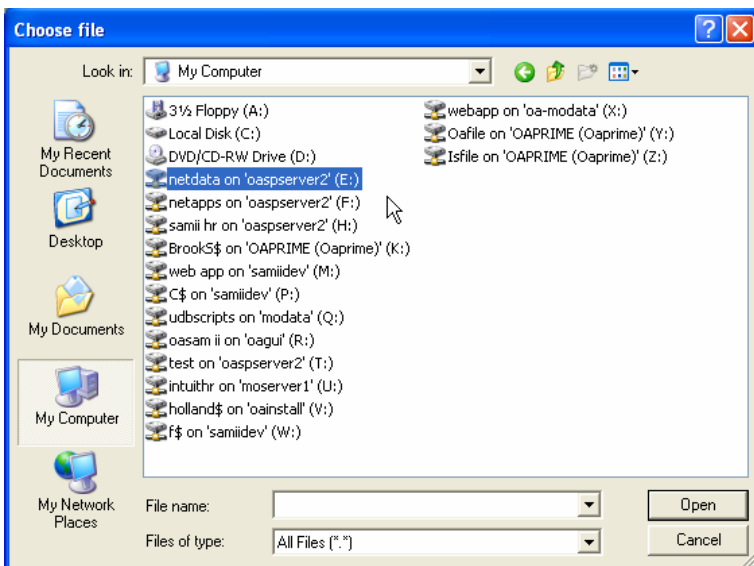


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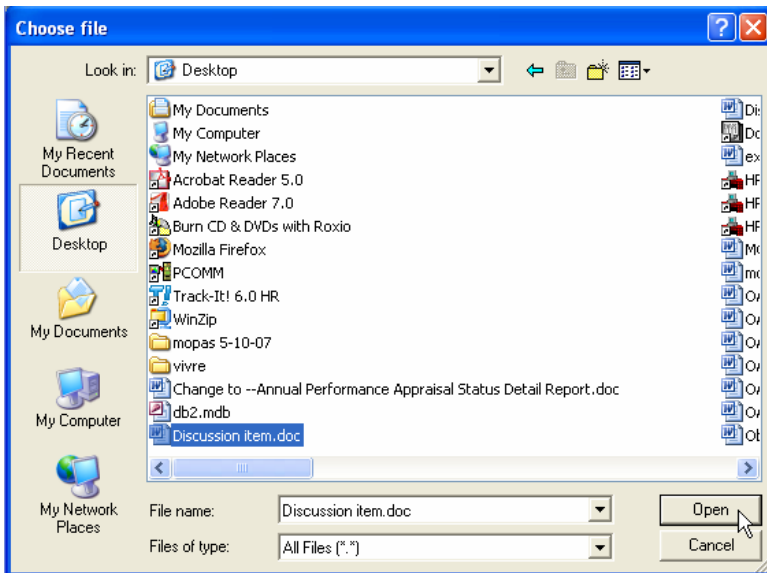
A new screen will pop up prompting the Rater to select a document to attach.



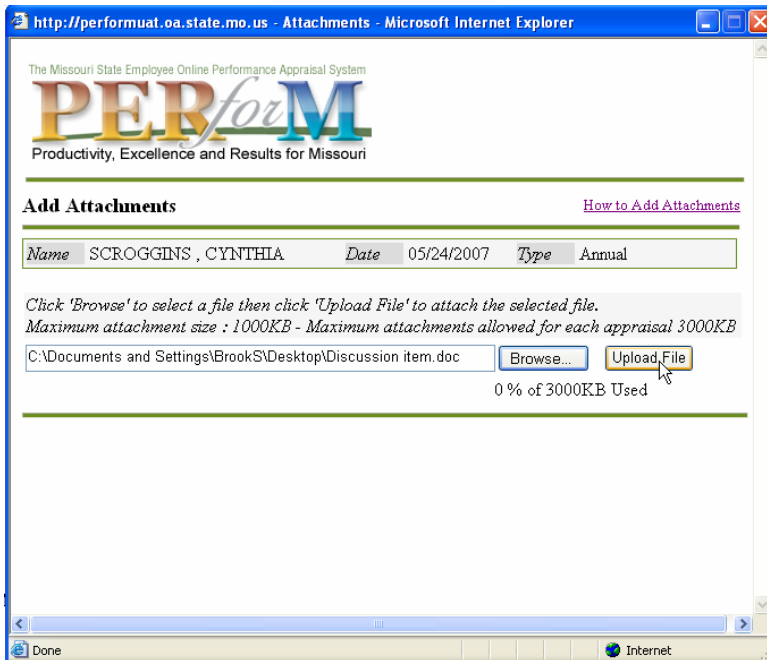
When the Rater clicks the browse button, he or she can select items from their own pc or the network to attach.



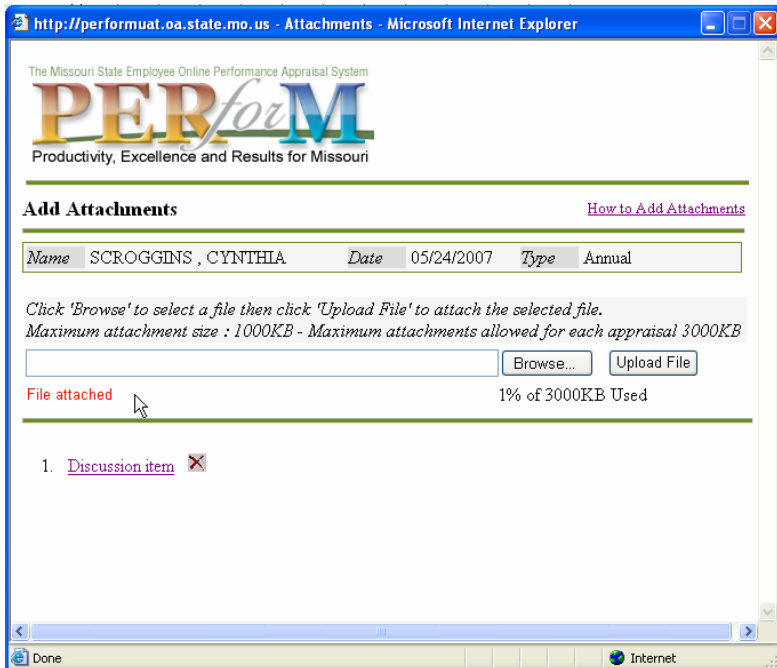
Once the Rater locates and selects the correct file to attach, he or she will click the “Open” button.



The file will then be selected in the browse drop-down and the Rater will click the upload file button to complete the process.



A message will be displayed that the file has been attached.



Routing the Appraisal to the Reviewer for Approval

All appraisals are “routed” to the Reviewer by clicking the “Submit” button on the bottom of the Create Performance Appraisal or the Edit/Update Performance Appraisal screen.

